

Model Planning Documents

Self-Help, Inc. (SHI)

Part IV

Three Year Goals and Strategy Development:

The goals and strategies that Self Help plans to adopt for the next three years will be listed in this section. The five issues chosen are a result of an intensive needs assessment and analysis of services and resources. These priority issues were chosen by the expanded Planning Committee who will present the completed Community Action Plan to the Executive Committee of the Board of Directors in July, 2005 for approval since the Board does not meet in its entirety during the summer months.

Priority One: Affordable Housing

Issue Statement: With housing costs skyrocketing and less affordable housing opportunities available in the community, how can Self Help increase the existence of affordable housing opportunities for low income families?

Strategy Statement: The problem of lack of affordable housing and expenses of related housing costs such as heat and utilities were highly noted in the community needs assessment. Over 64% or 591 individuals stated that they could not afford to pay for heat and utilities year round and 236 or 43.3% of respondents said they are paying more than 40% of their income in rent or mortgage payments. According to a recent census in Brockton, the homeless population has increased at an alarming rate. Staff, Board, and community residents all agree that affordable housing is a major issue in our service area. Although Self Help does not have the resources available to actually reduce rents and mortgages, it can, through housing support programs increase the opportunity for affordable housing through a coordinated effort. This can be accomplished by linking Self Help housing related services to existing efforts in the communities and fostering new partnerships. Additionally, SHI will seek new and expanded resources to improve housing quality and ultimately reduce housing cost for low income residents.

Home Ownership Programs/Activities	National Performance Indicators
Home Ownership 1. Provide first time home buyer workshops for low income families who want to own a home. 2. Provide down payment assistance grants through available state and federal funds to successful participants of the First-Time Home Buyer workshops who qualify for a mortgage.	NI 2.1.H Number of participants able to negotiate a first time home buyer purchase as a result of successful completion of workshops. NI 2.1.B Number of safe affordable housing units created through new home ownership.
Preservation Affordable Housing Programs/Activities	National Performance Indicators
Preservation Affordable Housing 1. Provide home owners with grants and low interest loans to abate lead hazards where children under 6 reside. 2. Provide low income homeowners with access to affordable/no cost home improvement programs to correct substandard living conditions and energy conservation programs to reduce housing costs. 3. Provide low income renters with access to home improvement programs including energy conservation programs to reduce housing costs.	NI 2.1.C: Number of affordable housing units preserved and made safe through agency activities. NI 2.1.C: Number of affordable housing units preserved through construction, rehabilitation and energy conservation interventions through agency activities. NI 2.1.C: Number of affordable housing units preserved through construction, rehabilitation and energy conservation interventions through agency activities.
Expand Housing Partnerships Programs/Activities	National Performance Indicators
Housing Partnerships 1. Maintain existing housing partnerships and foster new partnerships to expand affordable housing opportunities in the SHI service area.	NI 4: Number of agencies and organizations working with SHI to expand affordable housing opportunities for low income residents.

Priority Two: Affordable Childcare:

Issue Statement: How can Self Help assist low income working families with childcare cost for preschoolers and infants and toddlers and provide quality, full day year round care with dwindling resources in the community?

Strategy Statement: As more and more parents enter the workforce, a lack of affordable, high quality care for infants and preschool children is felt. Nearly 500,000 of our children in Massachusetts under age 12 have working parents. From our recent needs assessment, 63% of respondents said they need child care subsidies and 36% said they would work if they could find affordable childcare. The Head Start Policy Council identified the need for more affordable childcare. Program Managers and Directors listed Affordable child care as their number two priority and 61% of staff listed the need for affordable childcare as the agency's number one priority, more than any other problem area. Self Help has been providing quality early childhood care for over 40 years in its service area. It is our plan to attempt to expand affordable childcare opportunities to increase the ability of families to obtain initial or continuous employment or participate in employment training/preparedness programs.

Head Start Programs/Activities	National Performance Indicators
Head Start	NI 1.2.E. Number of parents obtaining and number of parents maintaining employment.
1. Increase number of full day, year round slots in Head Start for working parents.	
2. Submit application for Early Head Start Program to increase the number of infant and toddler affordable childcare slots available in the service area.	NI 5.B: Amount of Federal dollars mobilized for Early Head Start Program.
Community Partnerships Programs/Activities	National Performance Indicators
Community Partnerships for Children	NI 2.1.E. Number of parents obtaining and number of parents maintaining employment
1. Increase the number of child care subsidies in CPC towns for working parents.	
2. Assist working families in locating and securing affordable child care.	NI 2.1.E. Number of parents obtaining and number of parents maintaining employment.
Promoting Affordable Childcare Programs/Activities	National Performance Indicators
Promoting Affordable Childcare	NI 4: Number of agencies and organizations working with SHI to expand affordable childcare opportunities for low income residents.
1. Maintain existing childcare provider partnerships and foster new partnerships to expand affordable childcare opportunities in the SHI service area.	
2. Provide current information through internet and through distribution of promotional materials to increase parent knowledge of affordable childcare opportunities.	NI 6.3 Number of parents who exhibit increased knowledge of affordable childcare opportunities in their communities.



Priority Three: Employment Opportunities

Issue Statement: How can Self Help provide employment supports to clients to enable them to maintain employment and increase self sufficiency?

Strategy Statement: A total of 3,270 individuals collected Unemployment Insurance in Brockton during May 2004. The major industry group experiencing serious job loss in Bristol (where the city of Attleboro is located) was Manufacturing. This important sector lost over 1,500 jobs, a decrease of -5.6%. Through our Community Needs Assessment, 69% of respondents said their job does not pay enough;; 30% were unemployed; and 41% said they needed more skills to get a better job. Both the Board and Head Start Policy Council stated employment and employment supports are critical for families. The Program Directors and Managers chose Employment Opportunities and Supports as their number three priority. Self Help will work towards removing barriers to employment for low income individuals through the provision of employment support programs that allow clients to secure and maintain employment and through expanded partnerships with both the private and public sectors.

Career Opportunities Programs/Activities	National Performance Indicators
Career Opportunities	NI 1.2.A: Number of participants working part time in program and number finding permanent employment.
1. Head Start Program will offer parents opportunities for part-time employment to increase marketable skills.	
2. Head Start will provide certificate training programs for parents toward career goals and expanding employment opportunities.	NI 1.2.A: Number of parents enrolled in program and number of parents achieving certificates.
3. Meld Program will provide parents with pre-employment skills and competencies required for full time employment.	NI 1.1.A: Number parents participating in activities and % achieving desired outcome.
Job Placement Programs/Activities	National Performance Indicators
Job Placement	NI 1.1.A: Number of participants seeking employment and % actually obtaining employment.
1. Assist individuals in locating employers and applying for employment.	
2. Publicize SHI job opportunities on website and through local organizations assisting low income unemployed individuals.	NI 1.1.A: Number of low income unemployed individuals seeking employment with agency and % hired.
Employment Partnerships Programs/Activities	National Performance Indicators
Employment Partnerships	NI 4: Number of employment and training program partnerships developed towards better employment opportunities for individuals.
1. Provide on-site staff at area employment and training programs to assist individuals with employment supports necessary to participate in training programs.	
2. Maintain existing partnerships with programs and groups seeking to expand employment opportunities and foster new partnerships to expand employment opportunities in the SHI service area.	NI 4: Number of agencies and organizations working with SHI to expand employment opportunities for unemployed low income residents.

Priority Four: Before and After School Child Care

Issue Statement: How can the agency increase the availability of before-and-after school child-care in the community as well as address the needs of adolescents and youths in crisis due partly to lack of recreational and out-of-school activities?

Strategy Statement: The proportion of female-headed households with minor children in our service area is an indicator of childcare and after school care needs since single-parent families are more likely to need these services. In our community survey 34.8% of respondents needed before and after school care. In written responses the community, board and Head Start Policy Council were all very emphatic about the need for not only before and after school care but also needs of teens for employment, apprenticeships, recreational activities, a place to hang out or learn. They spoke of a "lost generation" of youth in need of mentoring. SHI has been a leader in childcare programs and will make every effort to encourage quality before-and-after and out-of-school programs and services that meet the identified needs of children and youth of our service area. SHI will also, through community partnerships, and where resources are available, develop new programs aimed at school-aged children.

Before-and-After School Programs/Activities	National Performance Indicators
Before-and-after school 1. Develop and publish list of all city and town before-and-after school existing programs in several languages. 2. Maintain existing partnerships with programs and groups seeking to expand before-and-after school opportunities and foster new partnerships to expand opportunities in the SHI service area. 3. Seek funding and resources for Head Start to supplement 1/2 day Kindergarten for low income children with additional 1/2 day program.	NI 6.3: Number of families receiving information and percent of youth enrolled in program as a result of agency activity. NI 4: Number of agencies and organizations working with SHI to expand before-and-after opportunities for unemployed low income residents. NI 5.C: Amount of dollars mobilized to offer wrap-around kindergarten opportunities for low income children.
Youth Development Programs/Activities	National Performance Indicators
Youth Development 1. Encourage and increase out-of-school opportunities for disabled, special needs and second language learners through partnerships with school departments and youth organizations. 2. Create volunteer opportunities for youth to participate in agency programs and participate in community service that meet the identified needs of school and community. 3. Seek subsidies for low income youth to participate in existing out-of-school educational and recreational programs.	NI 4: Number of agencies and organizations working with SHI to expand out-of-school activities/opportunities for youth with special needs. NI 6.3: Number of youth participating in community services program and % demonstrating improved social and emotional development. NI 6.3: Number of youth receiving subsidies and % youth increasing academic, athletic and social skills through participation in programs.
Meld Program 1. Provide teen mothers with weekly groups to increase parenting skills and reduce social isolation in the Brockton area.	NI 6.3: Number of mothers participating in groups and % showing measurable improvement in parenting and social skills.
Head Start Dad's Program 1. Provide monthly classes for Head Start fathers to improve parenting skills, reduce social isolation and increase interaction with children.	NI 6.3: Number of fathers participating in groups and % showing measurable improvement in parenting and social skills.
Family Based Services 1. Provide home visits to DSS referred parents at-risk for child abuse/neglect and teach family functioning skills and better parenting skills. 2. Provide children of DSS referred families with recreational and after-school program access to improve social/emotional development.	NI 6.3: Number of parents enrolled in program and % achieving better family functioning. NI 6.3: Number of children participating and % demonstrating improved social and emotional development.

Priority Five: Affordable Heat and Utilities

Issue: How can the organization help low income families afford rising heating costs and utility deregulation as well as avoid utility shut-offs and no heat emergencies?

Strategy Statement: In Massachusetts, some residents are expressing concern about the huge stranded cost liability which awaits consumers after the transition to competitive markets. Many are becoming worried that a failure to apportion these costs fairly will lead to a backlash once consumers become aware that up to 1/3 of their electric bill is allocated for covering bad utility investments and that the heralded 10% rate reductions are both minimal and temporary. Through our Community Needs Assessment, 64% of respondents said they could not afford heat and utilities year round; 12% said they went without heat for more than one day during the winter months; and 53% said their monthly expenses exceeded their monthly income. Over 56% of staff felt that their families could not afford to heat year round and another 48.6% felt their families were unable to pay all utility bills. The agency will strive to increase affordable heat and utilities through community partnerships and the administration of our heating assistance program and expand energy conservation services and education to reach more families with more cost saving measures.

Fuel Assistance Programs/Activities		National Performance Indicators	
Fuel Assistance		NI 6.2.B: Number of households seeking assistance, number receiving assistance and % of households assisted.	
1. Increase the number of households participating in the program through outreach and strong partnerships with local community organizations to assist in the delivery of services to families in need of heating assistance.			
2. Provide access to auxiliary heating and utility assistance programs in-house through FEMA and BCIP program and in community through Good Neighbors and other programs to decrease heating and utility emergencies.		NI 6.2.B: Number of households seeking emergency assistance, number receiving assistance and % of households assisted.	
Energy Conservation Programs/Activities		National Performance Indicators	
Energy Conservation		NI 1.3.3: Number of households participating in program and aggregated dollars in savings and % reducing heating cost and energy usage.	
1. Reduce the cost of heating and energy use through education and installation of conservation measures to increase household's financial assets.			
2. Provide relevant information and education to community-at-large on utility deregulation and anticipated affects on quality of life and assets of low to moderate income residents.		NI 2.2.A: Number of efforts by agency in partnership with community to prevent negative affects of utility deregulation and amount of assets preserved as the result of efforts.	
Budget Counseling Programs/Activities		National Performance Indicators	
Budget Counseling		NI 1.3.1: Number of individuals enrolled in budget counseling component, aggregated dollars in payments and % maintaining a budget for over 90 days.	
1. Provide budget analysis and credit counseling workshops for low income individuals towards financial empowerment.			
2. Provide free one-on-one credit counseling over the phone/internet or face-to-face and low cost debt consolidation to reduce monthly debt and increase financial fitness.		NI 1.3.1: Number of individuals enrolled in budget counseling component, aggregated dollars in payments and % maintaining a budget for over 90 days.	

Part V Linkages:

Self Help has formed many linkages and partnerships with area service providers, public officials, private institutions and the community at large. These relationships have been developed to coordinate services, insure non duplication of efforts, share resources, seek volunteers and community involvement and serve as many low income households as possible.

One-third of the Self Help Board of Directors includes representatives appointed by public officials including the Mayors and Selectmen of 20 cities and towns in the Self Help service area. A third of our Board is elected every two years by the limited income residents of our primary service area. The remaining third are representatives of major interest groups and currently include:

- Mount Washington Bank
- Harbour One Credit Union
- Head Start Policy Council
- Brockton Hospital
- AARP
- Old Colony Y
- Massasoit Community College



Each program works both independently and cooperatively to serve our target populations. This is accomplished through advocacy, case management services and referrals. There is a continuum of external and internal linkages for SHI clients and their families. Clients may enter any of the SHI programs for services and, as part of the intake process, will be asked if they are participating in any other SHI program or service. If not, they will be given information about SHI services and programs that the client and/or his family may be eligible for. Many of the SHI programs develop a service plan for clients to follow which includes in-house referrals and community referrals. A service plan can include referrals for SHI programs such as Head Start, Meld, Fuel Assistance, Weatherization or Lead Abatement to name a few. A community referral can include job training programs, substance abuse detox, WIC, TAFDC, Food Stamps, ESL or GED classes, Legal Services or domestic violence safe house. Other SHI programs are pass-through and involve minimal client contact, programs such as Fuel Assistance, Energy Conservation Services or food pantries. However, even with these programs, clients are informed of other SHI services and programs and given contact numbers for more information.

EMPLOYMENT:

SHI provides linkages for employment through in-house programs such as Meld and Head Start career services for parents. Additionally, supportive services such as child care for working families can be provided through Head Start and Community Partnerships for Children who provide child care subsidies for working parents. Community job related linkages used by SHI for clients include:

Massasoit Women's Center
Massasoit Community College continuing education program
Brockton Area Private Industry Council
Career Works
Work Investment Area
Boards
RISE

Ma Division of Employment Security
Brockton Area Association for Retarded Citizens
Regional Employment Boards
Coastline Elderly Services
Old Colony Elderly Services
DET
Jewish Vocation Services

Mass Commission Against Discrimination
Ma Job Training
May Center for Adult Services
Older Workers Program
Operation Able
Stoughton Youth Commission
BRAVO
Local employers

Self Help, Inc. (Draft)
Internal Needs Assessment
Staff Survey

Self Help is in the beginning of its three (3) year planning cycle. We are currently gathering information, opinions and demographics on residents of our service area, their issues, problems and barriers to self sufficiency and equal opportunity in areas of employment, housing, income management, child care, nutrition, family life and a host of other areas.

During this planning cycle the agency also does an internal assessment to determine from staff members opinions and suggestions on the agency itself, from administration to supervision to fiscal management and accountability. We are asking you to take a few minutes to fill out this survey and return it to: Carol Murray, Self Help Family and Parenting Center, 425 Pleasant St., Brockton, Ma. 02301. We do not require your name or program affiliation. All information is confidential and will only be used in evaluating Self Help and setting goals and activities to improve conditions, services and efficiency of this agency.

AGENCY KNOWLEDGE:

1. How long have you worked for Self Help? _____ ☐ months or ☐ years
2. Are you familiar with all the programs and services of Self Help? ☐ yes ☐ no
a.) If no, why? (please explain) _____

3. Are you familiar with the Mission of Self Help? ☐ Yes ☐ No
Briefly state what you think the Mission is: _____

4. Do you have (or have access to) Self Help's Personnel Policies? ☐ Yes ☐ No
If no, would you like a copy of the Personnel Policies? ☐ Yes ☐ No
5. Do you know the chain of supervision in your program and the names of your supervisor, his/her supervisor, etc. i.e., supervisor, coordinator, program manager, deputy director, program director, etc.? ☐ Yes ☐ No
6. Have you ever heard of ROMA (Results Oriented Management Accountability)?
☐ Yes ☐ No
7. Do you know where to go with problems such as discrimination, sexual harassment, grievances, etc.? ☐ Yes ☐ No

Please rate the functioning of the following areas of the agency either Excellent, good, fair or poor:

Areas of Agency	Excellent	Good	Fair	Poor
Agency Administration				
Fiscal Office				
Personnel Services				
Program Management				
Program Supervision				
Staff Support				
Advancement Opportunities				

Please indicate your reasons for any poor ratings:

CLIENT SERVICES

Based on your experience working with the families in your program and your knowledge of families in the community, please indicate by placing an X in the appropriate box to indicate the frequency of each of the problem areas that affect these families on a regular basis.

Problem Area	Majority of families	Less than 50% of families	A small % of families	Not a Problem
Retaining existing Housing				
Finding safe affordable housing				
Paying rent or mortgage				
Unsafe Housing				
Overcrowded Housing				
Unable to afford heating fuel				
Unable to pay utility bills				
Housing not energy efficient				
Purchasing enough food for family				
In food crisis more than 2 time a year				
Finding quality childcare				
Affording childcare				
Affording before/after school care				
Finding quality infant care				
Financial Instability				
No budgeting skills				
Unemployed looking for work				
No desire to work				
No marketable job skills				
Under-Employed				
No Health Insurance				
Inadequate Health Insurance				
Need better parenting skills				

SELF HELP INC.

780 West Main St Avon, Ma. 02322

Dear Friend,

Self Help, Inc. is in the process of doing a needs assessment of the communities it serves to try and determine the issues that you, or your neighbors, face every day in trying to raise you families. I am asking you to take a few minutes of your time to tell me your story and your opinions on issues such as child care, safety, housing, nutrition and anything that you think is relevant. Please return this survey to me no later than April 22, 2005. I have enclosed a Self Help addressed, stamped envelope for your convenience. Thank you so much for your help.

Sincerely yours,
Jonathan R. Carlson
Executive Director

Instructions:

Please fill in the blanks and check off the box(es) that is (are) reflective of you and your family at present. Please try to fill out the areas that pertain to you so that we have a complete understanding of your own, unique story. Please be assured that all information is confidential and will only be used in determining the needs in the communities Self Help serves. Feel free to leave blank any question that you feel are inappropriate or too personal. This is an anonymous survey and does not require your name or address. However, if you wish to include them you may.

I am a ____ year old (check one) ☐ Male ☐ Female. My ethnicity is (check one): ☐ African American
☐ Asian ☐ Cape Verdean ☐ Caucasian ☐ Haitian ☐ Hispanic ☐ Native American Indian
☐ Biracial ☐ Other (Please List) _____

I live in the city or town of _____ Ma.

If you have dependent children living with you, please fill out this section, otherwise go to the next section:
I have _____ dependent children living with me now. I am a (check one) ☐ Single parent ☐ Married Parent

☐ Unmarried Parent living with children's father ☐ Parent sharing custody

I (check one) ☐ Own my home ☐ Rent my home ☐ Live with parent(s) ☐ Live with friend
☐ Reside in a shelter or residential program

My annual family income last year was (check one): ☐ Under \$6,000 ☐ \$6,000 - \$10,000
☐ \$10,001 - \$15,000 ☐ \$15,001 - \$20,000 ☐ \$20,001 - \$25,000 ☐ \$25,001 - \$35,000
☐ \$35,001 - \$50,000 ☐ over \$50,000

I receive the following benefits (check all that apply): ☐ TAFDC (Welfare) ☐ SSI/DI ☐ Food Stamps
☐ Medicaid ☐ WIC ☐ Unemployment benefits ☐ Veterans Benefits ☐ Social Security Benefits
☐ Medicare ☐ Subsidized Housing ☐ Subsidized child care ☐ Job or Educational training stipend
☐ Other benefits (Please List)

How do you find out about what's available in your community (please check all that apply):
☐ Newspaper ☐ Radio ☐ Television ☐ Internet ☐ Phone book

SELF HELP COMMUNITY NEEDS SURVEY 2005

Instructions: Please answer yes or no to all questions that apply to you.

If a question does not apply than check box marked Not applicable. THANK YOU!

EARLY CHILDHOOD CARE	YES	NO	Not Applicable
I have preschool age children (If Yes, please answer next 5 questions; if No, go to next section-School Aged Children)			
I need full-day care for my preschool child while I work or go to school			
One or more of my children is currently enrolled in Head Start			
I need childcare for my infant/toddler while I work or go to school.			
The preschool program my children attend has quality and is affordable			
I would like access to childcare subsidies/scholarships for my child.			
My child has special needs due to physical or learning disabilities.			
SCHOOL AGE CHILDREN	YES	NO	Not Applicable
I have school age children (If Yes, please answer next 4 questions; if No, go to next section-Community Involvement)			
I need before and/or after school care for my school age child(ren)			
I am happy with the quality of the school my children attend			
My child has special needs due to physical or learning disabilities.			
I worry about my child's safety while in school			
COMMUNITY INVOLVEMENT	YES	NO	Not Applicable
I am a registered voter and vote regularly.			
I know who my local elected officials are and how to contact them			
I would like to volunteer in my community but don't know where to go			
I know where to go to get local information on community resources			
DISCRIMINATION	YES	NO	Not Applicable
I am a victim of discrimination because of (fill-in)			
I know where to go to get help with discrimination issues			
EMPLOYMENT	YES	NO	Not Applicable
I work or am looking for work (If Yes, please answer next 6 questions, If No, please go to next section-Education.)			
My family has two (or more) employed members			
I am unemployed looking for work			
I have a job that pays enough to meet my living costs			
I would work but cannot afford childcare			
I need more skills to find a good job			
I need transportation to find a good job			
EDUCATION	YES	NO	Not Applicable
I have a High School or GED diploma			
I can not afford to further my education			
I need help learning to speak English			
I have access to a computer and the internet			
I would like to learn how to use the computer and/or the internet			
One or more of my children dropped out of school before graduating			
A member of my family is illiterate			

SELF HELP COMMUNITY NEEDS SURVEY 2005

FAMILY	YES	NO	Not Applicable
I (or a member of my family) has a substance abuse problem			
One or more of my children are out of control			
I need parenting education			
I am an unmarried pregnant teen			
I am a victim of domestic violence			
One or more of my children are the victims of child abuse/neglect			
I know where to go for services if I suspect sexual child abuse			
My family life is stable and we respect and support each other			
HEALTH CARE	YES	NO	Not Applicable
I, and my family members have access to health care as needed			
All my family members have a primary care doctor			
I, and my family members have access to affordable dental care			
My health insurance is affordable			
My children are current with immunizations and check-ups			
I am concerned because my health care benefits have been cut/reduced			
I can afford all of my prescriptions and medications as prescribed			
My children under six have been tested for blood lead levels			
HOUSING/ENERGY NEEDS	YES	NO	Not Applicable
I live in my own house or apartment			
I live alone			
I share my home with another family or live in someone else's home			
I have been homeless at least once during the past 12 months			
My house or apartment is in good repair			
I have unresolved tenant/landlord issues			
My rent or mortgage cost are more than 40% of my total income			
I know (or suspect) that there is lead paint in my home			
My family has gone without heat for more than one day this year			
My family has had at least one utility shut-off during the past 12 months			
I can afford to heat my home and pay my utilities all year round			
FINANCIAL/BUDGETING	YES	NO	Not Applicable
I use food stamps			
I have trouble affording enough food for my family			
I have had to use a food bank at least once during the past year			
My family has a monthly budget that we follow			
I have a savings account that I am able to contribute to regularly			
My total monthly expenses are more than my total monthly income			
I pay more than \$300 a month for credit card debt			
I have been refused credit because of my credit history			
I have considered filing for bankruptcy			
I need credit counseling to consolidate my debt			
I have unresolved IRS or Mass Dept of Revenue debt			

SELF HELP COMMUNITY NEEDS SURVEY 2005

SAFETY	YES	NO	N/A
I feel safe in my own home			
I feel safe in my neighborhood			
I feel my children are safe in our neighborhood			
I (or a member of my family) have been the victim of a crime			
I (or a member of my family) has been convicted of a crime			
The police are quick to respond when needed			
I have witnessed crimes in my neighborhood			
I am concerned about groups of juveniles loitering in my neighborhood			
TRANSPORTATION	YES	NO	N/A
I have a problem accessing transportation			
I can afford to use public transportation			
I have access to handicapped transportation for myself/family			
I have my own transportation			
During the past 3 years please indicate the Self Help Programs you (or a member of your family) have participated in by checking yes or no. If yes please indicate if your experience with this program was a satisfactory one or unsatisfactory by writing either S (for Satisfactory) or U (for Unsatisfactory).			
SELF HELP PROGRAMS	YES	NO	S OR U
Did you know all the programs below are part of Self Help?			
Fuel Assistance			
Weatherization			
HEART-WAP (Energy Conservation Burner service/repair/replacement)			
Utility/Amp Programs			
Head Start			
Community Partnerships for Children			
Meld Parenting Program			
Family Based Services			
Lead Abatement Program			
Community Outreach Services			
Attleboro Food Pantry			
If you have indicated that your experience with one or more Self Help Programs has been Unsatisfactory , please explain, briefly, why you feel this way.			
If you have any other information or opinions about the needs of your community that have not already been asked, please feel free to record it here:			

Problem Area	Majority of families	Less than 50% of families	A small % of families	Not a Problem
Children out of control				
Need to learn to speak English				
Substance Abuse				
Domestic Violence				
Depression/Mental Illness				
Social Isolation				
Pending criminal offenses				
Other:				
Other:				
Other:				

- Do you think that, overall, services to clients are good? ☐ Yes ☐ No
If no, why?

- In your program, what do you think are the best services provided to clients?

- In your program, what services do you feel need improvement?

- In your program, what services are not currently being offered but you feel should be offered?

- Do you feel there is enough bilingual staff in your program to communicate well with?
clients that need service? ☐ Yes ☐ No
- Do you feel that your program provides equal opportunity to service for all eligible
residents of the service area? ☐ Yes ☐ No

WORKING CONDITIONS

- How would you rate your working conditions (i.e., space, light, comfort, supplies, technology available, etc.) ☐ Excellent ☐ Good ☐ Fair ☐ Poor
- How would you like to see your working conditions improved?

STAFF COMMUNICATIONS

1. Do you feel that you are kept informed by your supervisor (or the agency) of rules, events, opportunities that may be of interest or affect you? ☐ Yes ☐ No
2. How would you like to see information and communications improved?

3. Do you have (or have access to) a computer? ☐ Yes ☐ No
4. Do you have the ability to send and receive email at your job site? ☐ Yes ☐ No
5. Do you have access to the Internet (WEB) at your work site? ☐ Yes ☐ No

AGENCY COMMUNITY INVOLVEMENT

1. Do you feel that your program cooperates well with other, non-Self Help programs in the community? ☐ Yes ☐ No
2. Do you serve on any non-Self Help community board, coalition, or advisory group?
3. Do you feel that Self Help, as an agency, has a good reputation in the communities it serves? ☐ Yes ☐ No
4. Do you feel there is enough resident involvement in your program planning and evaluation?
☐ Yes ☐ No
5. In your opinion, how can Self Help (and your program) become more visible in the communities it serves?

OTHER:

Is there anything else you would like to add that was already addressed in this survey or should be addressed in this survey?

Thank you for your help!

Model Planning Documents

South Shore Community Action Council,
Inc. (SSCAC)

SECTION 2

COMMUNITY PROFILE

Highlights of Community Profile 1990 to 2000

The following summarizes demographic trends for SSCAC area towns. This information was compiled using U.S. census data and other data sources.

- Overall population growth from 1990 to 2000 was 11.2 percent, exceeding the state growth rate of 5.5 percent. The highest growth rates occurred in Kingston, Pembroke, Plymouth, and Marshfield.
- The population in SSCAC area towns is expected to grow more than 7 percent between 2000 and 2010. Growth rates are anticipated to be highest in Kingston, Carver, Plymouth, and Pembroke.
- A smaller proportion of the SSCAC area population lives in poverty (4.6%) than that of the state as a whole (9.3%). Poverty in SSCAC towns is concentrated in Hull, Plymouth, Kingston, Marshfield, and Pembroke.
- Poverty rates are higher for females (5%) than for males (2.8%).
- Almost half (48%) of those living below the poverty line are adults aged 18 to 64; 35 percent are children under 18; individuals aged 65 and up comprise 17 percent of those living below the poverty line. Children and the elderly are more likely to be living under the poverty line than are working-age individuals.
- Ninety-four percent of the population living below the poverty line is white; 2.5 percent is Hispanic; and 2.2 percent is black.
- According to the Women's Educational and Industrial Union (WEIU), the federal poverty level fails to accurately represent poverty considering the high living costs in Massachusetts. WEIU has developed a Self-Sufficiency Standard that accounts for actual living costs. The percentage of households with incomes below the Self-Sufficiency Standard is roughly three times that of households with incomes below the federal poverty level.
- Unemployment rose from 2.4 percent to 4.7 percent in SSCAC area towns between 2000 and 2004. The statewide unemployment rate was 5.1 percent in 2004.
- The newcomer population in Massachusetts is growing rapidly: Immigrants now comprise 14 percent of the Massachusetts population, compared to 9 percent in 1980.

SECTION 3

COMMUNITY NEEDS ASSESSMENT

This section provides a more detailed description of the needs for services among SSCAC clients summarized in Section 2 above. A brief description of all of the methodologies and survey instruments used to gather information on clients for this Strategic Plan is provided below. **Appendix A** contains each of the survey instruments used for this Plan. All findings in this section have been applied to SSCAC's three-year goals outlined in Section 6.

Methodologies

- 1) *SSCAC client demographic information* comes from 2004 agency intake data on 8,833 SSCAC households.
- 2) In February 2005, SSCAC conducted a *Community Needs Assessment* of clients who use SSCAC's *Energy* and *Childcare programs* to guide the development of its 2006-2008 Strategic Plan. The survey was sent to 928 clients, 368 of whom returned completed surveys. The objective was to gain a better understanding of client demographics and services needed in areas that SSCAC both covers and does not cover at this time. Survey results will guide the direction of services to offer -- or to collaborate on in the next three years. The survey consisted of open-ended questions as well as closed-ended ratings of client needs. Respondents of the *Community Needs Assessment* also provided demographic information so that client needs and demographics could be cross-tabulated and analyzed.
- 3) In March 2005, SSCAC administered an *SSCAC Staff Survey* to collect information on staff perceptions of SSCAC client needs for services. The survey was given to 125 employees, 25 of whom completed the survey. The questionnaire consisted of open-ended questions as well as closed-ended ratings of client needs. It is believed that the survey completion rate was low because most staff participated in focus groups where they had a chance to offer their perceptions of community needs and SSCAC as a workplace.
- 4) SSCAC also held five *focus groups with staff*. Focus groups with staff were held at all four agency locations in Plymouth, Kingston, and Marshfield. During focus groups, staff was asked about agency strengths and weaknesses as well as future directions for the agency and its programs.
- 5) SSCAC also conducted *individual interviews with agency management*. Individual interviews with senior staff members and the executive director focused on agency strengths and weaknesses and trends in the needs of area families, trends in service delivery, and gaps in service delivery as well as future directions for the agency.

- 6) SSCAC also conducted *individual interviews with six members of the Board of Directors*, all of whom are actively involved in the greater Plymouth area to gain a broad understanding of demographic trends, community needs for social services, future opportunities for SSCAC, and ways to further strengthen the agency's Board of Directors.
- 7) SSCAC conducted interviews with *two additional community leaders* to learn their perspectives on community trends and needs and to get a view "from the outside" on the ability of SSCAC to meet community needs.
- 8) *Recent reports and news articles* concerning relevant topics were reviewed to provide more in-depth information on demographic trends and changing community needs. This research is cited as background information in appropriate locations throughout this plan.
- 9) And finally, recently conducted *research by SSCAC on the nutrition needs of seniors* was also considered as part of the community assessment

Model Planning Documents

Tri-City Community Action Program, Inc.
(Tri-CAP)

Tri-City Community Action Program, Inc. (Tri-CAP) 2006 – 2008 Community Action Plan

1. Mission Statement

The Tri-CAP Board of Directors was satisfied with the verbal portrait of the Agency, as articulated in the Mission Statement (full and abbreviated) and the tag phrase. Therefore, the Board voted to keep the Mission Statement as previously articulated, making a one word change in line six (6) below – *i.e.*, changing “persons” to “people” and left the tag phrase unchanged. The Abbreviated Mission Statement was shortened to make it more pithy. All three were adopted by the Board of Directors at their May 3, 2005 meeting.

Mission Statement (full)

The primary mission of Tri-CAP, Inc., is to work with all sectors of the community to prevent the continuation and development of conditions which cause poverty or come as a result of people living in poverty. Tri-CAP seeks to educate the public and policy makers regarding the causes and conditions which stem from, create and perpetuate poverty. Tri-CAP will advocate for and provide services, which create positive, measurable changes in the quality of life of low-income people living in Malden, Medford, and Everett, and other local communities. The agency recognizes and encourages the active participation of the low-income community in all phases of program planning and implementation.

Mission Statement (abbreviated)

Tri-City Community Action Program, Inc. works in Everett, Malden, Medford, and surrounding communities to help eliminate the conditions that cause and perpetuate poverty.

Tag Phrase

“Working to Relieve Poverty Through Community Action”

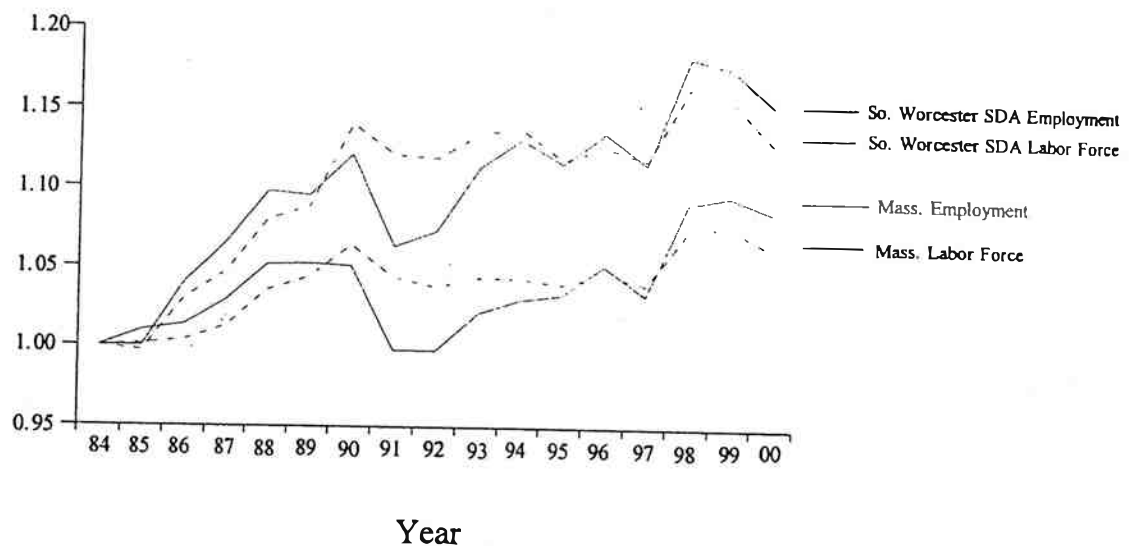
Model Planning Documents

Worcester Community Action Council,
Inc. (WCAC)

CHANGES IN THE AREA'S ECONOMY

Presented on the following pages are a series of charts and graphs indicating changes that have occurred in the economy of the Southern Worcester Service Delivery Area (SDA) during the past year. The graphics were originally prepared for the *Economic Conditions and Prospects Study* (based upon 1994 data), but have been updated for this report. You are referred to the original study prepared by the Central Massachusetts Regional Planning Commission for a more complete analysis of the area's economic characteristics.

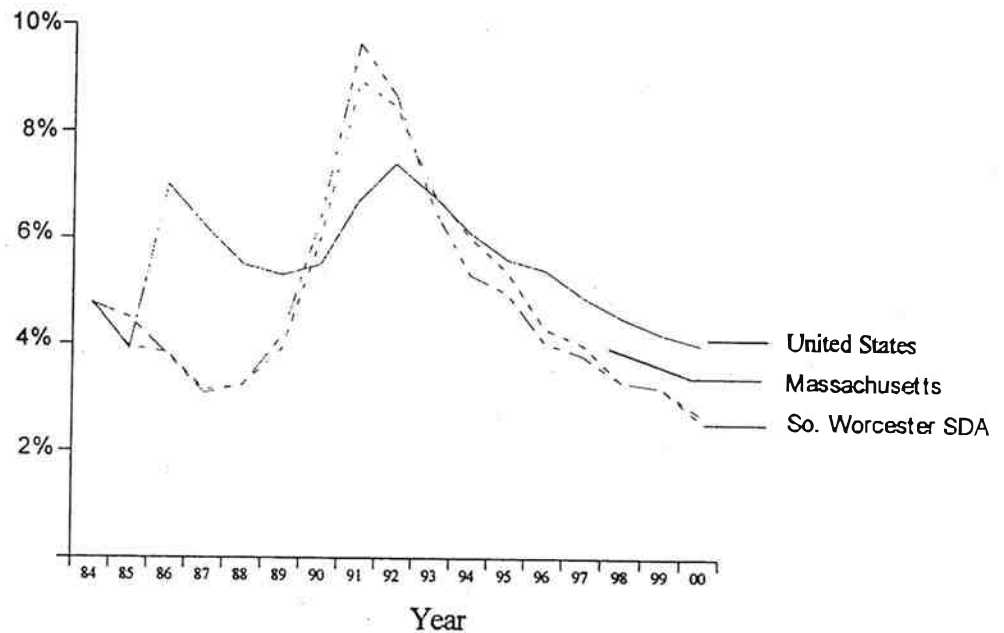
Labor Force and Employment



Source: MA DET

- ◆ From 1984 to 2000, the Southern Worcester SDA's employed labor force grew at a rate nearly twice as fast as Massachusetts: 15.3 versus 8.6%.
- ◆ During the period, nearly 33,200 additional jobs were provided for residents of the SDA bringing the total employed labor force up to 250,000.
- ◆ Since the end of the past recession in 1991 over 19,500 jobs have been added to the SDA's employed labor force.
- ◆ During the past year, the SDA's labor pool has continued to tighten with the total unemployed labor force reduced from 8,420 to 7,038.

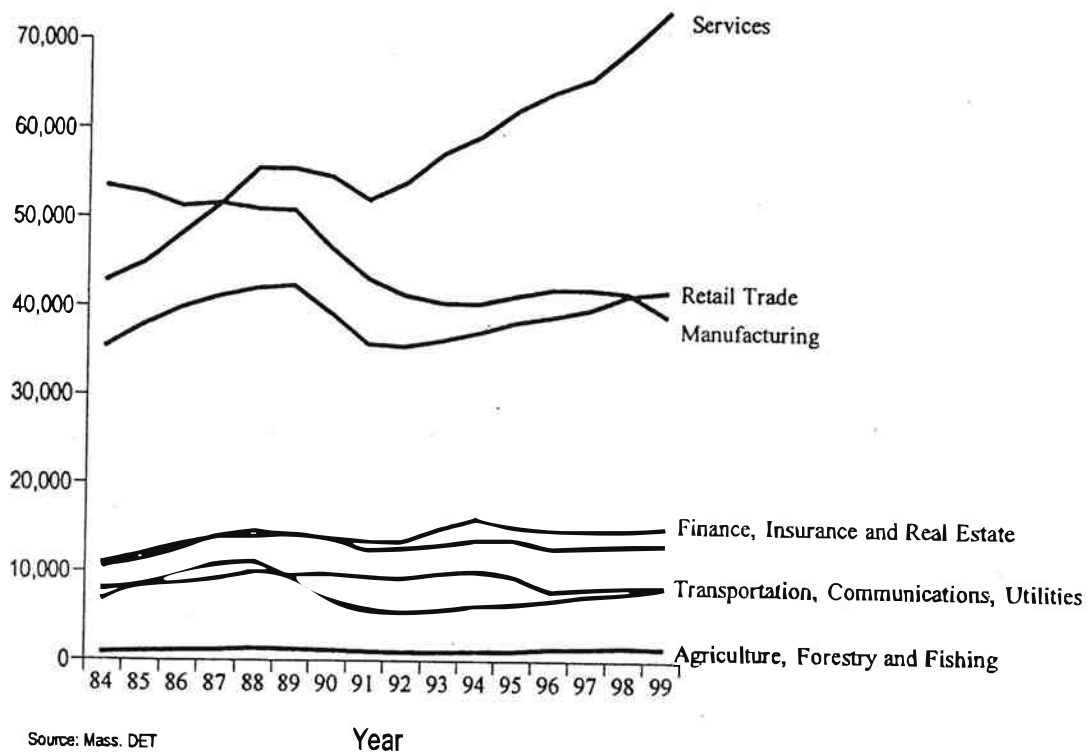
Unemployment Rates 1984-2000



Sources: MA DET and Statistical Abstract of the U.S.

- ◆ The unemployment rate in the SDA peaked in 1991 at 9.7%, higher than the national and state rates of 6.7% and 9.0% respectively.
- ◆ The national and state unemployment rates declined to 4.0% and 2.6% respectively in 2000.
- ◆ From 1999 to 2000, the unemployment rate for the SDA dropped from 3.1% to 2.7%.
- ◆ The 2000 SDA unemployment rate of 2.7% is the lowest in this 17 year period and continued a trend of decreasing unemployment rates since 1991.

Employment by Sector: 1984-1999



- ◆ Since the end of the most recent recession in 1992, Southern Worcester SDA employment (excluding government) has increased 28,037 or 16.3%. SDA employment in 1999 was 200,679.
- ◆ Industry shares of the SDA's total employment in 1999 have changed significantly since 1988. The only large sectors with increasing shares of total employment during the period have been *service* employment (from 27.8% to 36.5%) and *finance, insurance and real estate* employment (from 7.4% to 7.5%). Sectors with decreasing shares of employment included *retail trade* (from 21.1% to 20.8%), *manufacturing* (from 25.5% to 19.5%), *wholesale trade* (from 7.0% to 6.6%) and *construction* (from 5.6% to 4.2%).
- ◆ Non-government employment in the SDA from 1998 to 1999 increased by 2,795 or 1.4%.
- ◆ The *service* sector continues to be the dominant player in the area's economy with an employment total of 73,209 workers (36.5%) in 1999 an increase of 3,990 (1.5%) over the previous year.

- ♦ In the *service* sector, the largest employment categories (based on two-digit SIC codes) in 1999 and their percentage of total *service* employment are as follows:

<i>health services</i>	27,438	(37.5%)
<i>business services</i>	14,404	(19.7%)
<i>social services</i>	6,891	(9.4%)
<i>educational services (non-government)</i>	5,597	(8.2%)
<i>engineering, accounting and related</i>	4,399	(6.0%)

- ♦ *Manufacturing* is no longer the area's second largest employment sector. *Retail trade* is now second with 41,784 workers (20.8%), and *manufacturing* fell to third with 39,090 workers (19.5%). *Manufacturing* employment has been on a slow but steady decline since the fifties. During the past year, *manufacturing* employment fell by 2,520 (6.1%).

- ♦ The *retail trade* sector increased by 430 workers (1.0%) from 1998 to 1999. Experiencing growth since 1992, *retail trade* employment has increased by 6,307 workers (17.8%) over this period.

- ♦ In the *retail trade* sector, the largest employment categories (based on two-digit SIC codes) in 1999 and their percentage of total *retail trade* employment in the SDA are as follows:

<i>eating and drinking places</i>	13,690	(32.8%)
<i>miscellaneous retail store</i>	7,779	(18.6%)
<i>food stores</i>	7,624	(18.3%)
<i>auto dealers and gasoline stations</i>	4,285	(10.3%)
<i>general merchandise stores</i>	3,073	(7.4%)

- ♦ The *finance, insurance and real estate* sector employed 15,097 workers, a small gain of 263 from 1999.

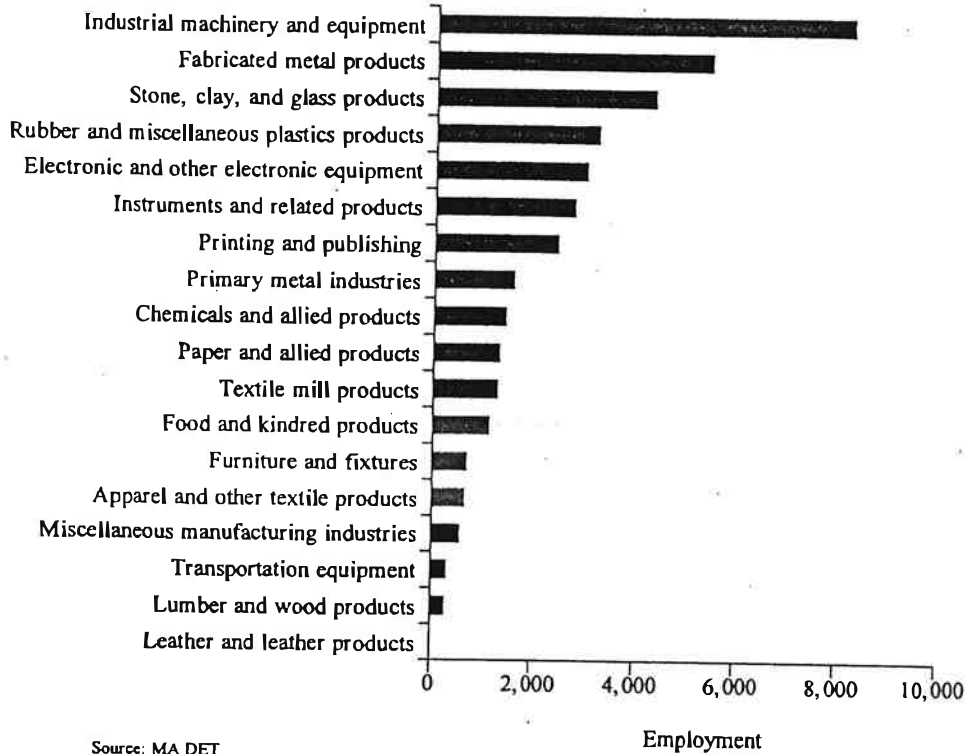
- ♦ In the *finance, insurance and real estate* sector, the largest employment categories (based on two-digit SIC codes) in 1999 and their percentage of total *finance, insurance and real estate* employment in the SDA are as follows:

<i>insurance carriers</i>	7,621	(50.5%)
<i>depository institutions</i>	3,430	(22.7%)
<i>real estate</i>	1,534	(10.2%)
<i>insurance agents, brokers and services</i>	1,338	(8.9%)

- ♦ The change in employment for the remaining sectors from 1998 to 1999 is as follows:

<i>wholesale trade</i>	-21	(-0.2%)
<i>construction</i>	718	(9.3%)
<i>transportation and public utilities</i>	31	(-0.4%)
<i>agriculture, forestry and fishing</i>	-96	(-6.3%)

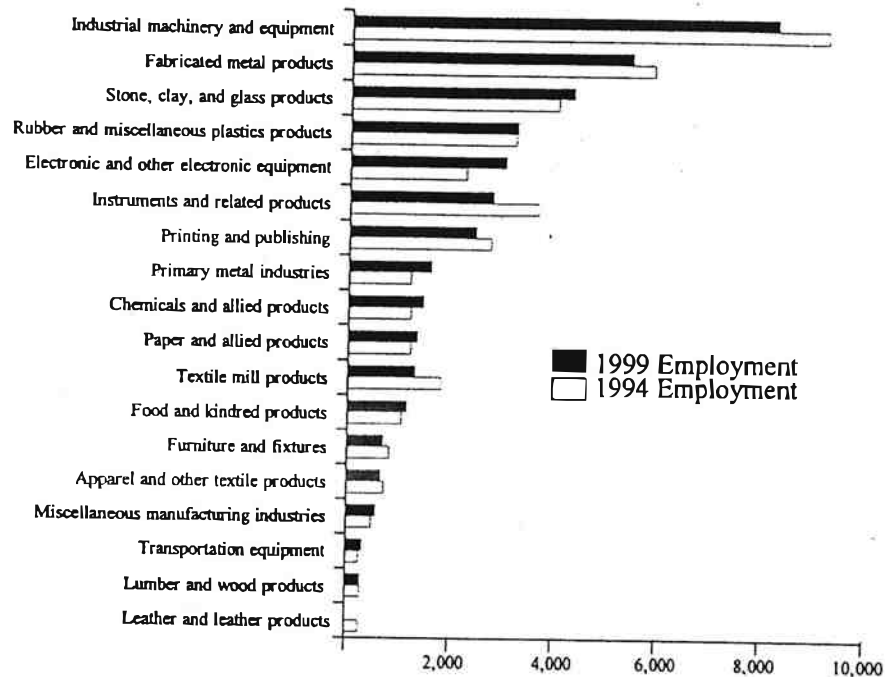
1999 Manufacturing Employment



- ◆ In the *manufacturing* sector, the largest employment categories (based on two-digit SIC codes) and their percentage of total *manufacturing* employment in the SDA are:

Industrial machinery and equipment	8,282	(21.2%)
Fabricated metal products	5,467	(14.0%)
Stone, clay, and glass products	4,347	(11.1%)
Rubber and Miscellaneous Plastic	3,247	(8.3%)
Electronic and other electronic equipment	3,026	(7.8%)
Instruments and related products	2,790	(7.2%)
Printing and publishing	2,461	(6.3%)
Primary metal industries	1,601	(4.1%)
Chemicals and allied products	1,444	(3.7%)
Paper and allied products	1,335	(3.4%)
Textile mill products	1,301	(3.3%)
Food and kindred products	1,141	(2.9%)

Manufacturing Employment: 1994 and 1999



- ◆ Manufacturing industries experiencing the largest employment gains during the period were principally in the technology sector and included the following:

<i>electronic equipment</i>	770	(34.1%)
<i>primary metal industries</i>	409	(34.3%)
<i>stone, clay and glass products</i>	308	(7.6%)
<i>chemicals and allied products</i>	246	(20.5%)

- ◆ The manufacturing categories experiencing the largest losses in employment during the period included:

<i>industrial machinery and equipment</i>	-961	(-10.4%)
<i>instruments and related products</i>	-865	(-23.7%)
<i>textile mill products</i>	-504	(-27.9%)
<i>fabricated metal products</i>	-418	(-7.1%)
<i>printing and publishing</i>	-285	(-10.4%)

- ◆ Between 1984 and 1999, employment in fabricated metal products decreased from nearly 9,300 to under 5,500.

Workforce Development Issue Paper

Central Massachusetts enjoys a strong, diversified economy with a low unemployment rate. It has developed a state-of-the-art, one-stop employment and training center (Workforce Central) that has eliminated the fragmentation of services for workforce development. Offices are in Worcester, Dudley, Gardner, Leominster and Milford. Workforce Central also "buys" training and education spots from other certified providers.

While maintaining its strong manufacturing base, the Central Massachusetts economy is expanding into cutting-edge health and biotechnology enterprises. Despite this overall positive picture, there are several serious challenges:

1. Overall net job growth for 2000 was only 1.1%
2. Unemployment/poverty pockets remain in inner city locations in Worcester and Southbridge.
3. While innovative programs to introduce, educate and train minority young people into high paying manufacturing and healthcare careers have been successful, transitioning them to the "culture" of work has been challenging.
4. There is an emerging health care employment shortage as the workforce in this area ages.
5. There is an emerging demand for ancillary workers, i.e. people in "white lab coats."
6. Foreign immigrants have accounted for nearly all of the net growth in the state's labor force over the last 10 years. Many of the 250,000 new immigrants to Massachusetts come with limited English skills.
7. There are perception problems among young people about present work conditions in manufacturing, i.e. most have clean environments with high wages.
8. The average age of a matriculating community college student is about 28. What's been happening with them the last (or lost) ten years?
9. There are not enough "conversations" between the public educational system (middle school - college) and the changing needs of business and industry.

Current successful efforts:

1. Work for Worcester's Youth. Workforce Central, in partnership with WCAC the school system, and the City of Worcester's Parks and Recreation helped find summer employment for 2000 youth enrolled in the *Work For Worcester's Youth*. Attendance rate was 90% with over 50% minority representation.
2. Worcester Working Coalition for Latino students is targeting Latino high school drop-outs. Home visits will assess the situation and reenroll students back to high school.
3. School-to-careers (formerly known as "school-to-work") continues through Worcester Voke and provides services to over 450 local companies.
4. Manufacturing Assistance Center provides a forum for manufacturing to focus on workforce development issues

5. There are many local agencies offering Alternative Education Programs in locations in Worcester and Southbridge.
6. UMass Pipeline Consortium and new Nursing Consortium provides introduction to middle/high school students to careers in healthcare
7. Regional Employment Council provides a forum for discussion of regional employment issues.

What is being done locally that we want to expand or develop:

1. More connecting activities that bring business, training and education systems together.
2. More marketing to let people know how welfare, unemployment insurance, education and training programs have been centralized.
3. Continued reform of the public education system - the establishment of career portfolios "Dr. Caradonio's Career Passport System" useful to businesses and colleges
4. More ESL programs - the two greatest barriers to employment are language and high school diploma.
5. Programs for older workforce.
6. Programs to address Worcester area's new diversity.
7. Middle school programs to introduce people to the "culture" of work.
8. Sustained efforts to help families early on with basic skills.
9. Transportation links between inner city/suburban neighborhoods and businesses. New bus from Southbridge to downtown Worcester/Quinisgamond is positive but underutilized.
10. Fast-track educational programs for certain careers.
11. Ongoing partnership dialogues between company CEO's and colleges to identify needs and develop programs.
12. Promote awareness of current job training programs.
13. Offer apprenticeships/career ladders for long-term careers (i.e. electrician)

6/05/05

Strategic Planning-Community Profile

Summary

Worcester is a mid-size New England city that reflects many of the many other American cities in its composition and challenges. The city has historically had a strong manufacturing base but over time has moved towards the technology and healthcare industries.

According to the 2000 census, Worcester is New England's third largest city with 172,648 residents. but the second largest in Massachusetts. (Providence is second largest in New England.)

Although the economy was thriving during the nineties, problems remained for low -income neighborhoods and residents. This is particularly true for those with limited education, limited English language skills, and limited work histories. Some areas, especially in South Worcester, lack the economic and institutional support for creating/renovating affordable housing units.

Since 1990, despite new downtown development secured through public and private partnerships:

- Overall net job growth for 2000 was only 1.1%.
- Unemployment/poverty pockets remain in inner city locations in Worcester and Southbridge.
- While innovative programs to introduce, educate and train minority young people into high paying manufacturing and healthcare careers have been successful, transitioning them to the "culture" of work has been challenging.
- Foreign immigrants have accounted for nearly all of the net growth in the state's labor force over the last 10 years. Many of the 250,000 new immigrants to Massachusetts come with limited English skills
- The average age of a matriculating community college student is about 28.

Worcester continues to be a city of neighborhoods, with active resident groups in all parts of the city. Centro Las Americas, Henry Lee Willis, Friendly House, and South Worcester Neighborhood Center are the major, City supported centers for social services. In addition to the neighborhood centers, community development corporations, focused on affordable housing and economic development, are also located in the neighborhoods. WCAC, a founder of the South Worcester Neighborhood Center (SWNC), continues to "delegate" some activities to SWNC, as well as to The Main South CDC and the Worcester County Food Bank.

Always a city of diversity, Worcester is home to an increasing number of new immigrants. In addition to the growth of the Latino and Southeast Asian populations, there is a substantial influx of Albanian refugees, Russians and

other East Europeans, Portuguese, and Africans (especially from Ghana). According to 2000 US Census figures, 25,097 individuals within Worcester were foreign born, 14.5% percent of the city's total population, which was higher than the 12.2 percent for the state. The 2000 data showed an increase of the immigrant population since 1990. Census data also recorded that more than half (54.1%) of the city's foreign-born population had entered since 1990 as compared to (40.4% for the state). 28.1% of Worcester residents reported speaking a language other than English at home, 45.5% of those persons admitted to speaking English less than very well.

Characteristics of target population:

Worcester is a medium sized urban city with a total population of 172,648 according to 2000 census data. 17.5 percent of the population has obtained a college degree and only 29.3 percent graduated from high school. 15.1 percent of the population is Latino/Hispanic, 4.9 percent is Asian and 6.9% are black or African American. Over the past decade, Worcester has seen a large influx of refugees and immigrants from such parts of the world as Africa and Albania. According to figures provided by Worcester Public Schools, 5,498 immigrant students attended school for the 2002-2003 school year. The highest percentage of these students came from Albania (440), Brazil (453), Dominican Republic (290), Vietnam (313), Puerto Rico (1791), Liberia (154) and Kenya (126). About 40% of the over 5,000 refugees and immigrants who have come to Worcester County in the past three years have come from countries where a concern with wellness, nutrition or organized health has been almost nonexistent. These families face special difficulties as residents of our city; i.e., the stress of adjusting to a new country, language difficulties, trouble navigating healthcare, school and other systems, not to mention financial difficulties in affording healthcare, housing, etc.

Like many American cities, Worcester families struggle in comparison to families in other sections of the country. 15.6% of Worcester households are headed by single mothers, as compared to 11.9% for the state as a whole and 12.2 % for the country. 24.8 percent of families with children under 5 years of age live below the federal poverty level, (as compared to 12.2 percent for the state as a whole and 17 percent for the country). 57.1 percent of families with female head of households and no husband present and children under the age of five live below the poverty level, (as compared to 45.4% for the state as a whole and 46.4 percent for the country). For families living in Worcester who have children that are 5 years or younger, 24.8% live below the poverty level, as compared to 12.2 for the state and 17 percent for the country). The median household income for Worcester families is \$35,623 vs. \$50,502 for Massachusetts and \$50,046 for the country.

How are services delivered?

- **Accessible and convenient locations.** WCAC recognizes the importance of accessibility for clients, partners, volunteers and funders. The main office at 484 Main Street in Worcester is across from Worcester City Hall and in the center of the downtown area. This site houses the administrative offices, energy programs, education classrooms, and community based services. In addition, we have two sites in downtown Southbridge for Head Start and at one of them, the McKinnon Center, we offer Energy Services and occasionally, Mediation and classroom programs, as well. Our Head Start classrooms are also in Spencer, Leicester, Millbury and Oxford. Our Head Start classes from Webster and Oxford have consolidated at a small school in Oxford (previously the town's Kindergarten building). Healthy Families has moved to that location, as well.
- **Outreach and Intake.** The agency produces an Annual Report, newsletters and brochures that are used by all programs for outreach and marketing. Staff participate in local cultural events, jobs and service fairs, and community coalitions. Each program director is expected to distribute information from other programs to prospective clients. Within their own area, program managers are responsible for marketing, intake/selection, services, and follow-up. Most programs have clearly defined eligibility guidelines and projected outcomes.

The application process and services offered differs from Head Start to Fuel Assistance to GED classes. Some programs require appointments for intake (primarily education) and others (like Fuel) do not. Most, though not all, programs have income eligibility requirements. What is consistent among all WCAC programs is the emphasis on timely and courteous service to all applicants. If an applicant is ineligible for the service requested, staff refer to other resources whenever possible.

Service delivery within all WCAC programs emphasizes self-sufficiency. Clients learn to solve problems, to advocate for themselves and to plan for the future. This is especially true in the family oriented programs (Head Start, Healthy Families, Worcester Community Connections, IDA project) and in the educational activities (AmeriCorps/Cityworks, GED classes)

In recent years, WCAC has focused more on centralized intake and outcome measures. With ROMA, all programs are incorporating outcome measures within the service delivery system.

- **WCAC also delivers services through a network of partnerships and subcontracts.**
WCAC does not work alone! We operate through informal networks, formal subcontracts and service agreements. All program managers engage other providers, constituents and residents, and/or funders as advisors and partners. Several programs have their own advisory boards. Most employ consultants,

workshop leaders and others to bring additional resources to their departments. Department directors and the Executive staff as well as individual employees participate in community boards, task forces and events. And they are encouraged to do so. WCAC is an active stakeholder in the Worcester community, the towns of Southern Worcester County (especially Southbridge) and in local coalitions.

Worcester Community Action Council, Inc.
Strategic Plan
October 1, 2005-September 30, 2008

Notes: Goals I, III, VI must be addressed.

- I. Low Income People Become More Self-Sufficient**
- II. The Conditions in Which Low-Income People's Lives are Improved**
- III. Low-Income People Own a Stake in Their Community**
- IV. Partnerships**
- V. Agencies Increase Their Capacity to Achieve Results**
- VI. Low-Income People, Especially Vulnerable Populations, Achieve Their Potential by Strengthening Family and Other Supportive Systems**

Strategy Statement Issue framed as question, followed by Strategy Statement

For Goal I.

Issue: How can WCAC support clients who are in need of employment, thus assisting them in becoming self-sufficient?

Strategy Statement: Lack of education is a "root cause" of poverty and must be addressed if individuals and families are to secure employment that leads to/ensures self-sufficiency. Many low income residents lack the education and/or skills for the requirements of the workforce of this new century. The results of the needs assessment and focus groups clearly identified education for children, youth, and adults as a primary goal for WCAC. The need grows but public funding for this priority has been drastically reduced over the past 10 years. To meet this ambitious goal, WCAC will build on the current foundation of successful education and employment programs, add services through creative fundraising and expanded partnerships, and design and deliver specialized services to the growing immigrant populations. As noted in the Profile, Worcester is experiencing a rapid influx of non-English speaking immigrants. Included are Eastern European groups, Africans, Latinos and Southeast Asians. While ESOL classes have never met the demand in our community, the need is now overwhelming. WCAC will offer ESOL, computer classes, employment and housing assistance and other services targeted to the emerging populations. Within three years WCAC will have an organized system of case management for all clients (Energy, Education, Head Start, etc.) that will identify the assets and needs of the family and assist applicants to develop goals, strategies and timelines for achieving self-sufficiency.

National Indicator: 1.2 Employment Supports-The number of low-income participants for whom barriers to initial or continuous employment are reduced or eliminated through assistance from community action as measured by one of the following: (list)

A topic not discussed in 2002 was a Succession plan for Senior Management and specifically, a transition plan for the Executive Director. It is part of the Strategic Plan for 2005. What follows is a paper, written by the current Executive Director, for consideration by the WCAC Board of Directors. It was presented to the Executive Committee in April of 2005 and then revised for the June Board meeting.

Revised 6/15/05

To: WCAC Executive Committee
Fr: Patsy C. Lewis, Executive Director
Re: Draft for Discussion-Succession Planning

Reasons for Succession Planning

Succession planning is an area receiving considerable attention in the non profit sector. It is happening for several reasons. First, we are at a time when a generation of executive directors (baby boomer vintage) is either considering retirement or "re-direction." Second, we know there are sudden exits (resignation, termination, illness, etc.) that leave a board less than prepared to pursue a thoughtful replacement process. Third, the nonprofit environment is such that a board and "stakeholders" need to take time and consider all of the requirements of the position (Mission, Management, Finance, Fundraising, etc.) before starting a process and/or making a decision.

The WCAC Executive Director since 1987, Patsy C. Lewis, has announced her intention to resign from WCAC in the Spring of 2005 and "re-direct" her time to other pursuits. This Strategic Planning Process enables the Board of Directors to engage in a thoughtful process to determine the skill set needed to lead the organization into the future and to decide on the tasks and timetable needed to select that leader. Those tasks and the timetable will be determined in September or October with the expectation the search process will begin in January.

The following notes are a combination of quotes from the YOU, Inc. Succession Policy and from conversations in/about WCAC. There is also an attachment regarding Transition Planning.

"The best time to prepare and plan for the departure of the leader of an organization is before that leader has decided to leave. Staff turnover at the highest management levels, while potentially challenging for and disruptive to an organization, is both normal and necessary. With planning and management, changes in staff at the highest levels can take place in a manner that maintains continuity and sustains and an organization's mission and values." Y.O.U., Inc. 11/19/03

To continue quoting from the Y.O.U., Inc. document, "The Board of Directors is the hiring authority for the CED. The CEO is the hiring authority for all other positions within the agency. The Board working as a partner with the CEO, also has an interest in management's plan for the succession provisions for other key administrative positions appointed by the CEO...By having a succession plan, the Board and CEO can begin the process of evaluating, testing and judging potential successor candidates in advance of an actual change.

The CEO working with the Board should have a succession plan that includes planning for losses (either temporary or permanent) of high-level staff associated with the organization's critical functions."

At WCAC such positions are:

- Director of Programs
- Chief Financial Officer
- Director of Administrative Services

Other positions, such as Director of Energy Services and Director of Head Start, might be added, as well. None of the listed positions currently have someone(s) designated as Assistant. Good management procedures include "contingency planning, cross-training, etc." (Y.O.U., Inc.) At WCAC the Executive Director leads a knowledgeable, collaborative Senior Management Team. The team is kept current regarding major issues facing the organization. WCAC does not have an Associate Director (Asst. Executive or Chief Operating Officer), and there isn't one senior team member responsible for leading the organization. However, as a team, they are prepared to do so. The Transition (or Executive Committee) may want to consider designating an interim team "leader."

Plan-Discussion Points

Emergency

When the CEO is unable to serve in the position (the "smush theory"), the Board (through its Executive Committee members according to the Y.O.U., Inc. model) will:

- Designate an interim president and chief executive officer to assure continued operation without disruption. In case of Emergency, the.....will act as the interim CEO until the Board acts to appoint an interim and/or permanent replacement for the CEO.

Planned Replacement

Y.O.U., Inc. Plan

- Provide the necessary resources to carry out an effective search,